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14. ABSTRACT

During Operation *IRAQI FREEDOM* (OIF) the military experienced unprecedented levels of press coverage. New methods of handling the media, such as embedding reporters with individual units, were lauded by many as a tremendous success. To some it seemed as though the historical problems of distrust and censorship had been solved, and this war marked a new era of cooperation between the military and the media. This paper addresses lessons learned from OIF in terms of how well the military managed media relations, both during and after the conflict. It argues that theater military commanders lacked the resources to properly seize the initiative in a concurrent war of public perception, especially after the termination of "major operations." To support this thesis, the paper describes inherent shortcomings in the military Public Affairs (PA) programs, and how its employment was flawed throughout the conflict. It also examines the potential risk of mingling PA functions with military deception efforts and other forms of Information Operations. Lastly, this paper provides recommendations for the operational commander to better prepare for the "perception war" that inevitably accompanies military operations.

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Newport, RI

PREPARING FOR THE "PERCEPTION" WAR

Why a Better Public Affairs Program is Important to the Operational Commander

By

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A paper submitted to the faculty of the Naval War College in partial satisfaction of the requirements of the Department of Joint Military Operations.

The contents of this paper reflect my own personal views and are not necessarily endorsed by the Naval War College or the Department of the Navy.

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18 May 2004

Abstract

During Operation *IRAQI FREEDOM* (OIF) the military experienced unprecedented levels of press coverage. New methods of handling the media, such as embedding reporters with individual units, were lauded by many as a tremendous success. To some it seemed as though the historical problems of distrust and censorship had been solved, and this war marked a new era of cooperation between the military and the media. This paper addresses lessons learned from OIF in terms of how well the military managed media relations, both during and after the conflict. It argues that the theater military commanders lacked the resources to properly seize the initiative in a concurrent war of public perception, especially after the termination of "major operations." To support this thesis, the paper describes shortcomings in the military Public Affairs (PA) programs, and how its employment was flawed throughout the conflict. It also examines the potential risk of mingling PA functions with military deception efforts and other forms of Information Operations. Lastly, this paper provides recommendations for the operational commander to better prepare for the "perception war" that inevitably accompanies military operations.

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INTRODUCTION

"While the military needs the press in order to retain the support of the public and Congress, it fears the success of that mission will be compromised by a probing press corp.[1]

Public opinion, as influenced by media reporting, has the ability to shape and affect the ultimate success of any military operation. Accordingly, public opinion is of the utmost importance when considering the use of military force in any situation. In recent years, military commanders have struggled with methods to cope with a seemingly ubiquitous and increasingly international news media, while at the same time looking for new ways to manage public perception of their efforts. In this struggle they have historically turned to their public affairs organizations, for both guidance and execution of this management effort.

Operation *IRAQI FREEDOM* (OIF) was one of the most heavily reported military conflicts in history. New methods of handling the media, such as embedding reporters with individual units, were lauded by many as a tremendous success. To some it seemed as though the historical problems of distrust and censorship had been solved, and this war marked a new era of cooperation between the military and the media. The unprecedented news coverage coupled with these new methods of managing media interaction, however, pushed an already strained military public affairs program to the brink of failure. The not-so-obvious issue of "mixing" public affairs with information operations (if one perceives this to be true) may have also damaged the ability of public affairs to effectively win public support for the military.

There have been literally thousands of papers, articles and books dedicated to the subject of military-media relations. This paper will examine the role of public affairs and analyze lessons learned from military-media relationship as it evolved during OIF. It will support

the argument that the theater military commanders lacked the resources to properly seize the initiative in the public perception battle; a setback that affects us to this day. To support this thesis, this paper analyzes the successes and failures of the embed program and how the military struggled to employ its public affairs assets properly throughout the conflict. It describes the current shortcomings in military PA programs, and describes the proper role it must play. It also discusses the potential risk of misusing PA functions to support other operations that aim to "manipulate" perception. Operational commanders must understand the proper role of the Public Affairs program, and why it is vitally important to employ this "critical function" properly. In order to provide some useful guidance, this paper will provide recommendations to improve the way we manage media interaction in the field, and make improvements to the way we equip, organize and employ our public affairs organizations to support the operational commander.

BACKGROUND

> "Neither Clausewitz nor Sun Tzu had any advice for military commanders on how to manage the news media during times of war. But both agreed that strategic information – about battle plans, troop strength, disposition of forces and so forth – should be denied the enemy so as to enhance an army's ability to use deception and the element of surprise."[2]

The media, by nature, are "skeptical and intrusive" and act as a "watchdog over institutions of power, be they military, political, economic or social."[3] They see themselves as a "Fourth Estate", or a fourth branch of government.[4] While this may be a noble cause, it is somewhat tainted by the fact that televised and printed news organizations are competitive businesses. The coverage of military operations is a big money-maker for the media, and while most journalists respect the military's need for informational security, some are more than willing to sacrifice national security to make an extra buck or promote partisan politics.

Commanders must weigh the requirements of defending the nation and the media's implied right to access to be successful in today's joint operations.[5] This balancing act revolves around the military's demand for operational security (OPSEC), and the media's need to report in detail and as rapidly as possible.[6] One of the main PA functions is public (external) information, which primarily deals with coordinating media relations.[7] The media is not the audience, it is simply the conduit by which the military reaches the external national and international public.[8] This function is crucial, in that it is the means by which the military garners public consent and international support for its activities, combats enemy propaganda, and protects its own interests, such as obtaining funds from Congress and enhancing its image for recruiting.[9] Command (internal) information is another important PA function in which the audience is our participating forces, forces left behind at home, and military family members.[10]

For the Joint Force Commander (JFC), the PA staff provides advice on media events and operations and help with the development and dissemination of the command information message.[11] PA staffs help with informational security by establishing ground rules for media coverage of military operations.[12] They also plan and assist US military support to the media in conjunction with military operations, and assist media by helping them understand military events and operations.[13] Today's news is formed by data and images which often move faster than the ability of journalists to provide explanation and context, and this challenges both the commander and his/her PA staff in their effort to keep both their internal and external publics informed.[14]

One inherent problem in our PA organizations is that there are no joint PA units. Individual services maintain their own PA structure, with unique regulations and policies.[15]

Individual services also place different emphasis on the PA profession itself. These differences are perceived by media journalists and reporters, who have noted varying degrees of PAO competence, cooperation and credibility, depending on which service provided the PAO.[16] When PA manpower is needed to augment a JFC staff or operation a critical joint PA center or information bureau, it is provided through an arbitrary ad-hoc process.[17] PA staffers report as individuals, not part of a trained and cohesive public affairs team.[18] Because they are not units, established methods of measuring readiness, deploying forces and acquiring resources to sustain operations do not apply.[19] Frequently, when PA staffs reach an operational peak, it is time to re-deploy and start again.[20] Current Regional Combat Commander (RCC) PA staffs are not sufficiently manned to support sustained operation, and are forced to rely on the ad-hoc augmentation process.[21] All too often, the help comes with little experience or knowledge of the area, the mission, or the standard operation practices of the command.[22] There is no formal venue or forum that prepares a PAO to function as part of a Press Information Center (PIC), Joint Information Bureau (JIB) or JTF PA staff.[23] With little or no formalized collective or team training, standardized practices, or adequate preparation, PA staffs are asked to perform these tasks time and time again.[24]

OPERATION IRAQI FREEDOM (OIF) LESSON LEARNED

"The Pentagon may have been dragged kicking and screaming into its current embrace of the news media. But it is making the most of it. Planners must have contemplated advances in media technology and decided that if they can't control the press, they may as well use it" [25]

Since the Civil War, censorship has been one of the primary means by which the military has maintained operational security.[26] Throughout the twentieth century the media was excluded from most combat operations, including the first Gulf War.[27] This exclusion has

been an enduring strain on the military-media relationship, and a constant gripe from news reporters. The military attempted to reverse this trend during OIF.

Just prior to the start of OIF, the Office of the Secretary of Defense (OSD) provided tasking, guidance and procedures for embedded media support.[28] This guidance spelled out how the embedded journalists were to live among the soldiers, how they were to behave, and how much access to information they were to be given. A PA tiger team, consisting of representatives from Joint Forces Command, CENTCOM, and all service components, had already been staffing detailed plans to handle the expected media barrage, including the embeds.[29] One initiative, the media "boot camp", was offered to prepare embeds for the rigors of combat.[30] Attendance was not a requirement, however, and not all embedded journalists took advantage of this training.[31] The media embed program was to be unsurpassed in scope. Some 777 journalists embedded with U.S.-led coalition forces during the war (527 crossed into Iraq, primarily with Army and Marine units) generated as many as 6000 stories a week, making it one of the most heavily reported military conflicts in history.[32] After the end of major combat operations the military and media formally met on several occasions to resolve issues and answer questions that arose during the conflict. Were the embedded media a help or a hindrance? Were they a propaganda tool by which the military sought to send a message to the enemy? How did embeds compare to the so-called unilateral journalists? What affect did embeds and unilateral journalists have on our PA organizations, and vice versa? Will embeds go to war again? Military unit after-action reports and post-war media editorial articles give us different perspectives on the success of this military-media endeavor.

The 1st Marine Division OIF Lessons Learned report gave an overwhelmingly positive evaluation of the media embedding program. According to this report, media reporters "adopted by their units", and by sharing dangerous and austere living conditions, "journalistic desires of impartiality gave way to human nature."[33] The report describes how the embed program significantly reduced Iraqi ability to conduct a propaganda campaign, and pointed out enemy abuses more often than not (shooting from mosques, shooting civilians, etc…).[34] Embeds told the military's story in humanistic way: "1st MARDIV was not an anonymous killing machine – it was an 18 year-old Marine from Anywhere, USA."[35] Embedded reporters also assisted 1st Marine Division PA in accomplishing their internal information mission, by allowing their military counterparts to use their cameras, and satellite/cellular phones to contact their units and families at home (Division PA equipment was lacking in both quantity and quality).[36] This type of interaction happened in other units, raising security concerns about cell phones giving away positions in the field.[37] The report also mentioned that "while embedded journalists by and large adhered to security ground rules" and "attempted to clarify their understanding of events with their military counterparts," the "un-embedded (unilateral) journalists routinely released information jeopardizing OPSEC and frequently misreported errors in fact."[38]

The 1st Marine Division report also described the problem of media vehicles on the battlefield.[39] Rules that forced embeds to ride military vehicles posed some logistical problems for the Division, but at least the military could control them and provide better security.[40] Other divisions allowed some embedded media to requisition their own vehicles and move from unit to unit, to accommodate the journalist's desire to seek better overall coverage.[41] 1st Marine Division did experience significant problems with the unilateral

media vehicles on the battlefield cutting into convoys and getting in between enemy and friendly units during firefights, sometimes resulting in media casualties.[42]

The 3rd Infantry Division (Mechanized) OIF After-Action Report also gives a relatively positive evaluation of media embedding, recommending it as the first consideration for media accompanying and covering military operations.[43] Like the 1st Marine Division lessons learned, the Army report describes how the trust and close integration of the media with soldiers in the field led to stories that published the great work of the 3rd ID and helped to balance out enemy propaganda and negative press from reporters outside Iraq.[44] It recommends that media be trusted with more sensitive information, so that they have better context and understanding of operational plans.[45] In addition, the report emphasizes that "train as you fight" doctrine requires training with embedded media, and current training programs do not prepare units for this (they only train for encountering the media on the battlefield).[46] The report also claims that restrictive DOD Public Affairs Guidance (PAG) prevented media from embedding with 3rd ID units early in the deployment cycle, resulting in delayed or interrupted team building between units and their media counterparts.[47] The report also recommends that broadcast media be allowed to bring their own transportation, so that they can transport their own equipment and provide better coverage.[48]

The United Kingdom Ministry of Defense also examined media lessons during OIF. Their report on Operations in Iraq states that "embedding reporters with coalition forces resulted in accurate reporting of coalition operations", but "this effort should have been matched by arrangements to address international and regional audiences."[49] The UK experienced similar shortfalls in media specialist manpower, training and equipment.[50] The report also addressed the issue of embeds and media operations personnel departing shortly

after the conflict, leaving inadequate coverage of the post-conflict phase to satisfy media demands and effectively counter negative coverage.[51]

A recent Navy Times article also points out how the embed program put an unnecessary strain on the PAOs in theater.[52] This article refers to a (yet to be released) 128-page OIF lessons learned report from Joint Forces Command, which states that public affairs staffs were so busy dealing with the embedded journalists they were in many cases unable to assist the nearly 3,700 non-embedded reporters in the region.[53] This was a critical shortcoming in that "many of these regional (non-embedded) journalists worked for Arab-language news outlets with powerful influence on public opinion in Iraq and nearby countries," and "this led to missed opportunities to get critical messages to a critical audience."[54] The referenced report claims that "part of the problem was the assumption that journalists would travel with their units from the United States," but "instead, a majority of the reporters went into the Gulf region on their own, which in turn forced the limited PAOs in theater to get them hooked up with their units."[55] The article also states that "after Baghdad fell to U.S. forces, nearly all media un-embedded, and because the PA system was so focused on embedding, no organic capability was fielded in time to assist the coalition in telling the post-combat story."[56] This article highlights the general and unintentional neglect of many unilateral journalists, who wanted to cover the war from a broader angle than an embedded reporter. This shortfall was also described by military commanders attending a military-media conference at the Army War College in September 2003. One Marine Colonel stated: "The U.S. lost the 'information objectives campaign' when most embeds left, since coverage now focuses on soldiers being ambushed and killed."[57] By September 2003, only twenty six embedded reporters remained in Iraq; only two remained in Afghanistan.[58] Major General

James D. Thurman, Chief of Operations for Coalition Forces Land Component Command, said: "We lost information superiority with the departure of the media."[59] He also noted that there weren't enough public affairs officers involved in the postwar "stability and support" phases, and "good news" stories aren't being told.[60] The media had some things to say about the apparent lack of support for unilaterals. One article describes military press briefings in Qatar as "useless and barren of information," and that journalists were "astounded by the amateurish nature of the press operation there."[61]

In an earlier military-media conference in Chicago, military representatives also talked about the problem with unilateral reporters.[62] Brig. Gen. E. J. Sinclair, Assistant Division Commander for the Army's 101st Airborne Division in Iraq, described an instance where his soldiers shot up a white pickup truck driven by a German reporter, because they couldn't distinguish it from hostile forces.[63] Military commanders also complained that, without protection from U.S. forces, unilaterals frequently needed to be rescued from dangerous situations, which put American service members at risk.[64]

During an October 2003 briefing on joint lessons learned during OIF, Army Brigadier General Cone, Director for Joint Lessons Learned, Joint Forces Command, called embedding a "huge positive," but two major concerns about media embedding still linger.[65] One would be the consequences if "something went seriously wrong", like a chemical attack or fratricide incident.[66] The other is a conflict with the notification process, where "you know there have been casualties and the chain of command can't get on top of it because it is coming in real time."[67] Cone also admitted that we could have done a better job providing assets to cover the unilateral reporters, as well as providing more coverage for Air and Naval efforts.[68]

MIXING WITH IO

"In Iraq, the Bush Administration has beaten the press at its own game. It has turned the media into a weapon of war, using the information it provides to harass and intimidate the Iraqi leadership."[69]

During and after the war, many in the media complained that they were being used by the military as part of a pro-American propaganda campaign. Some thought that dressing in the colors of one side might lessen one's independence and turn a journalist into a participant on the battlefield.[70] Others felt that the "government has no business being in the news business."[71] Some went as far as calling military press conferences a Psychological Operations (PSYOP) campaign.[72] During the September 2003 military-media conference, Major General Thurman said that he sought to "leverage" the embedded reporters to "impact what the enemy was thinking."[73] Deputy Assistant Secretary of Defense for Media Operations Brian Whitman said that "the embeds were intended to counter Iraqi disinformation" and that they "gave the military a chance to shape the tone of coverage."[74] One may ask if there is some confusion between the military's obligation to provide open and accurate information to the media, and the need to conduct Information or Psychological operations.

Information Operations (IO) are defined as actions taken to influence, affect, or defend information, information systems, and decision making.[75] PSYOP are operations planned to convey selected information and indicators to foreign governments, organizations, groups and individuals in order to influence their emotions, motives, objective reasoning, and behavior.[76] Joint doctrine (both current and proposed) forbids the use of PA as a military deception capability, or to provide disinformation to internal or external audiences.[77] It specifically states that PA and PSYOP activities must remain separate and distinct in the

minds of the public and the media and in practice.[78] It also states that PA and PSYOP staffs should coordinate activities to preclude any negative impact of one operation on the other, and PA officers should remain cognizant of external misconceptions and perceptions concerning any apparent interaction of these two activities.[79] This seems be contradictory guidance. To add to the confusion, doctrine also states that PA should not be considered an IO discipline or an IO tool, and that PA activities are complementary to yet distinct from IO.[80] It is clear that PA involvement in the embed program was in keeping with their mission to counter enemy propaganda by allowing the "true story to be told." There is, however, a feeling in the press that they were "duped" into reporting "overly optimistic" and/or misleading information, and even though this may or may not be true, its perception is a dangerous gray area we need to avoid. Successful relationships between the military and media are based on credibility and trust that is built over time.[81] Withholding or manipulating information or creating the impression that the command PA is unnecessarily withholding or manipulating information that should or could be provided to the media, reduces the command PA's credibility and operational capacity.[82] It also violates DOD policy, which states that it is the responsibility of DOD to make available timely and accurate information so that the public, Congress, and the news media may assess and understand facts about our national security and defense strategy.[83] The credibility and reputation of the U.S. military in the international media is a strategic center of gravity for combating adversary propaganda, and it is absolutely imperative that this credibility be maintained.[84] If it is not, the operational ability to use PA for combating adversary propaganda and maintaining national understanding and/or international support could be permanently and irreparably damaged.[85] Current and proposed doctrine that allows for PA staffs to coordinate

and cooperate with PSYOP and IO planning boards is flawed in that it provides a starting point for the credibility problem as described above.

RECOMMENDATIONS

A successful media operation starts with careful planning. Commanders must ensure that the PA assessment of anticipated resource requirements, in terms of manpower, facilities, and equipment, is incorporated as early as possible in the deliberate and crisis action planning processes.[86] In addition, PA considerations must be an integral part of the commander's staff battle rhythm. Each phase of an operation will have different PA requirements, and the operational commander and his staff must anticipate the surge and ebb of media coverage as the operation and/or campaign unfolds.

As discussed in the analysis, the lack of sufficient PA manpower and some shortsightedness in the planned PA employment strategy were significant shortfalls during OIF. The ad-hoc means of assembling JFC PA staffs, as well as the general lack of cohesive joint training, experience and joint doctrinal guidance were inherent problems that planners inherited from the get-go. To solve this issue, dedicated joint PA groups should be established that train and deploy as teams when called upon to augment RCC or JFC PA staffs. A draft Joint Forces Command White Paper titled Joint Public Affairs Support Element (JPASE), describes a concept designed to provide DOD and RCC with a permanent peacetime cadre and a deployable capability of PA support for a broad spectrum of operational contingencies.[87] In essence JPASE would serve as a standing joint public affairs organization designed to provide the JFC with a rapidly deployable, highly capable, trained and equipped PA force to support global military operations.[88] Funding for such an organization would obviously be an issue. It is recommended that RCCs support the Joint

Forces Command JPASE initiative (or an equivalent capability) as they would any other crucial force combat capability. PA staff capability is just as important as any new weapon system.

PA facility and equipment requirements must also be considered in operational planning. OIF lessons learned pointed to many cases where PA equipment was non-existent, or showed up too late to be of use to PAOs in theater. PA staffs should have up to date equipment, adequate transportation, and dedicated facilities to better interact with an increasingly high-tech news media. Facility and equipment requirements need to be addressed early in the planning process so that procurement and/or leasing can occur in a timely manner. Both 3rd ID and 1st MARDIV lessons-learned reports recommended that embedded TV media be allowed to use their own vehicles to allow for better press coverage, and to reduce the logistical burden on the military units involved.[89] In my opinion the media would take advantage of this mobility and go off on their own if there wasn't much news to report in their particular area. This, in turn, would exacerbate the problem demonstrated by the unilateral vehicles on the field. I recommend that that RCCs and JFCs anticipate the need for additional media vehicles, and require these for units assigned to their AOR. This may encourage more media organizations to embed with the military, vice driving around the battlefield on their own. Once again, RCCs should place higher priority on getting PA resources to theater as soon as heightened media interest is apparent.

Operational commanders should also prepare clear Public Affairs Guidance (PAG) specific to the mission, which are easily understood by all members of his/her staff. All members of a RCC or JFC staff should receive general PA training, so that they may have a sincere appreciation for the importance of this critical function.

Operational commanders and their PA staffs must carefully consider how to manage media interaction during all phases of an operation, and make recommendations to the Office of the Secretary of Defense (OSD) via the RCC prior to the commencement of hostilities. The American public and press have gotten used to the embedded media, and while it has proven to be an excellent anti-propaganda tool, it is not necessarily the tool for all jobs. A careful risk assessment must be conducted prior to allowing media to embed in future operations. 1st MARDIV lessons learned pointed out that during OIF "we need to remember that we were both good and lucky," and that the press will bring both the "good and bad news into the spotlight." [90] If not properly planned, embedding is a potential drain on unit resources and the military's PA organization. Accordingly, embedded media should be allowed to join their units state-side, and train with them during exercises as they work up for deployment. Media "boot camps" should be mandatory for any journalist that wishes to take part in the program. Lessons learned point out that most units have had no formal training that deals with embedded media. While unit training is a function of individual services, the RCC should demand this capability in all forces that could potentially be assigned to his/her region. The RCC and/or JFC should also ensure that sufficient and well trained PAO manpower is allocated to the unilateral media, and that media centers are run efficiently and professionally. This was one of the greatest PA shortfalls of this conflict, and its effects linger to this day.

As discussed in the analysis, there is a lingering perception in the media that many journalists were misled into reporting "overly-optimistic" or "deceptional" stories contrived by military planners. While most of these perceptions are unfounded (in my opinion), this issue highlights the fact that military credibility is paramount. Joint doctrine makes it a point

that PA and IO/PSYOP do not mix, and that the perception of their collaboration should be avoided. Doctrine also states that JFC staff PA and IO/PSYOP planning groups and cells should coordinate and cooperate to ensure de-confliction of efforts. This, in and of itself, is a conflict of interest in my opinion. If anything, PA should concentrate solely on the coordination and dissemination of factual information, without any interaction with IO or PSYOP functions. IO/PSYOP planners should carefully monitor what the media reports, and plan their efforts accordingly. Any loss of PA credibility can severely damage the RCC/JFC staff's ability to counter enemy propaganda, and maintain public and international support for their mission. Operational commanders must be aware of this, and keep these functions separate.

Finally, the operational commander must be able to evaluate the success and credibility of his/her PA effort. As suggested by joint doctrine, one way is to assess the general tone of the media in their questions and dealings with the public affairs officers and the command in general.[91] A good relationship based on a credible PA staff should be readily apparent. A second is a continuous assessment of available media products and opinion polls.[92] Your PA staff should monitor what is the media saying about your operation, and how much public opinion polls favor your efforts. Another method is to estimate the impact of command information on the internal audience from the feedback of other functional areas and subordinate commands.[93]

CONCLUSION/SUMMARY

The operational commander can never hope to control the media, or even win the "war of perception." The best he/she can hope for is to anticipate and mitigate the public opinion "damage" that will inevitably occur during any armed military operation. An effective public

affairs organization is the key to successful military-media interaction, which in turn, is crucial to the success of military operations. Operational commanders must appreciate the importance of the PA organization and take action to support its improvement. Shortfalls in trained and experienced PA manpower, joint PA training and doctrinal guidance, and up-to-date equipment must be addressed. Properly resourced PA staffs must be in place early to plan and coordinate media interaction throughout all phases of the deliberate or crisis response planning process. PA assets must be able to manage the full spectrum of media coverage in theater (embedded and unilateral). If no one is there to tell the military's story, someone else will inevitably tell it for us. Careful considerations must be taken into account prior to embedding media with operational units. The success we achieved during OIF will not necessarily repeat itself in future conflicts. Credibility is of the utmost importance when dealing with the news media. It is necessary to effectively combat enemy propaganda, as well as maintain critical public and international support. Accordingly, PA functions should never be associated with IO or PSYOP efforts.

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